

NEW: 12/11/2014

General Information


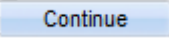

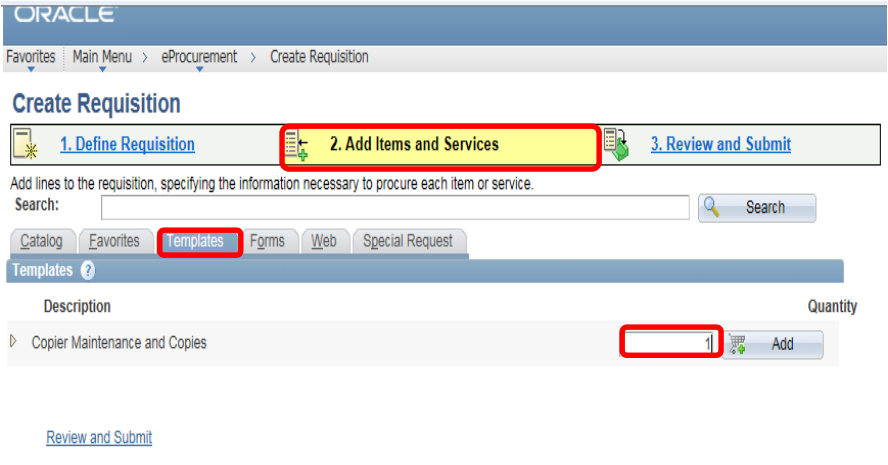
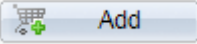
Task	Process Information
Using a Requisition Template (for Recurring Requisitions)	<p>NOTE: As a prerequisite, please see the tip sheet for “Creating a Requisition Template”.</p> <p>Once created, a requisition template can be used for recurring orders. NOTE: Templates are unique/personal to a Requester.</p> <p>Use of a Template is the preferred method for recurring orders. The Copy Requisition method is an alternative, though <u>not</u> recommended because unwanted information may be unintentionally included. For example, you would not want the old Buyer Name to be carried forward on the new requisition, as this could delay/prevent sourcing to a purchase order. The Template method will default the Buyer to “Field_Buyer” (or blank), so your new requisition can be assigned to a Procurement Buyer and then sourced to a purchase order.</p>

GEARS Navigation

eProcurement > Create Requisition	
-----------------------------------	--

1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	On the  1. Define Requisition tab: Define your requisition by giving it a name.	NOTE: It is important to give your requisition a meaningful name to make it easier to find later. Requisition Name: <input type="text"/>
2.	Click the  button.	
3.	On the  2. Add Items and Services tab: A. Click the Templates tab. B. Find the Template you would like to use. C. Enter the quantity you would like to order. NOTE: A quantity of "1" will contain ALL of the goods in the template.	
4.	Click the  button.	

5.

On the

**3. Review and Submit**

tab, confirm your requisition lines.

Information carried over from the template for each requisition line includes: Description, Vendor, Quantity, UOM, Price, Location, and Account.

NOTE: Account is the only chartfield stored on the template.

6.

Return to the

**1. Define Requisition**

tab

and click the “Line Defaults” arrow to enter default information such as:

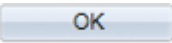
Ship To, Due Date, Attention, and Chartfields.

NOTES:

- A. The defaults entered here will populate ALL requisition lines.
- B. Account is the only chartfield stored on the template.
- C. You do not have to enter any/all chartfields here. If you prefer, you can populate each requisition line manually, or use a Speed Chart. See steps below.

7.

Click the **Continue** button.

8. Click the  button to have the defaults applied to all distribution lines.

ORACLE

Favorites | Main Menu > eProcurement > Create Requisition

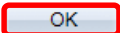

Distribution Change Options


For the selected requisition lines, apply distribution changes to

☒ **All Distribution Lines**
Apply changes to all existing distribution lines.

☐ **Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.

☐ **Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

9. Click the  **3. Review and Submit** tab to confirm that default information has been applied to all distribution lines.

NOTE: If needed, you can manually adjust each requisition line, or use a Speed Chart.

ORACLE

Favorites | Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | **3. Review and Submit**

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Administrative Office of Court *Currency:
 Requester: Rose Finney Priority:
 Requisition Name:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Yearly maintenance and Copier	XEROX CORPORATION	12.0000	Each	24.20000	290.40
2	BW copies XKP523788 9/1/14 to	XEROX CORPORATION	1.0000	Each	478.68000	478.68
3	Color copies XKP523788 9/1/14	XEROX CORPORATION	1.0000	Each	150.00000	150.00

☐ Consolidate with other Reqs ☒ Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: Price:
 Status: Active *Ship To: [Modify Onetime Address](#)
 Attention To:
 *Distribute By: SpeedChart:

Accounting Lines

Chartfield1	Chartfield2	Details	Details 2	Asset Information	Asset Information 2	Budget Information
Account	Batch Agy	Fund	Program	Approp Number	Approp Yr	PCA
0902	C25	0001	B006	A0006	AY2015	80001


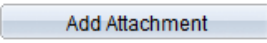
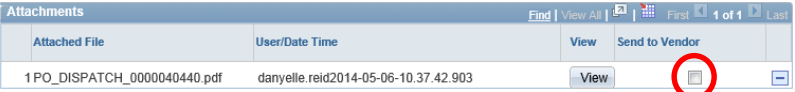

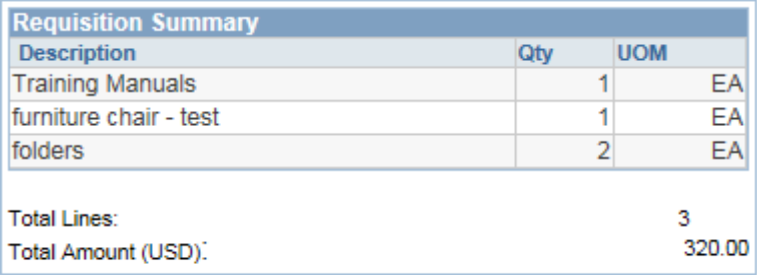
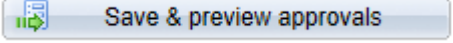
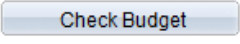
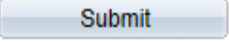
☐ Select All / Deselect All Total Amount: 919.08 USD

[Add to Favorites](#) [Add to Template\(s\)](#) [Modify Line / Shipping / Accounting](#) [Delete](#)

Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

[Check Budget](#) [Save & submit](#) [Save & preview approvals](#) [Cancel requisition](#) [Find more items](#) [Add Request Document](#)

10.	Enter Line Comments/Attachments	<ul style="list-style-type: none"> To add comments or attachments about line items, select the  icon at the far right of the line. Enter comments into the text box and/or click the  button to add an attachment.  <p>NOTE: Ensure that the check box for Send to Vendor in the attachments list has a check mark in it. This allows Procurement to view the attachment.</p>
11.	 Confirm your selections in the cart.	
12.	Save the Requisition by clicking the	 button.
13.	Check budget for available funds by clicking the	 button.
14.	Submit the Requisition for approval by clicking the	 button.

**Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.